

Frontiers: The Interdisciplinary Journal of Study Abroad

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Volume 35, Issue 3, pp. 24-52

DOI: 10.36366/frontiers.v35i3.762

[www.frontiersjournal.org](http://www.frontiersjournal.org)



# Equitable Study Abroad Fee Policies: History, Literature, and Recommendations

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## Abstract

This article presents history, literature, and recommendations to guide study abroad administrators and institutions of higher education to enact equitable study abroad fee policies. A review of the literature (a) underscores the need for institutions to advance social justice by providing equitable access to the high impact practice of study abroad, and (b) indicates that each institution should engage in its own collaborative interdepartmental investigation to identify how an equitable study abroad fee policy can be accomplished in a financially sustainable and administratively manageable way. The article explores factors of the home school tuition policy, which is becoming more common among private colleges and universities, and it provides recommendations for how study abroad administrators may advocate for equitable policies and navigate the complex task of a policy review.

## Abstract in Spanish

En este artículo se presentan la historia, publicaciones y recomendaciones para guiar a los administradores y las instituciones de educación superior con el fin de adoptar políticas equitativas de tarifas para los estudios en el extranjero. Una revisión bibliográfica (a) subraya la necesidad de que las instituciones fomenten la justicia social brindando un acceso equitativo a la práctica de gran impacto de estudiar en el extranjero, e (b) indica que cada institución debe participar en su propia investigación colaborativa interdepartamental para reconocer cómo una

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Accepted date: March 11<sup>th</sup>, 2023

política equitativa de tarifas para estudiar en el extranjero puede lograrse de una manera económicamente sostenible y administrativamente manejable. En el artículo se analizan los factores de la política de matrícula de la institución de origen, que es cada vez más común entre centros y universidades privadas, y se ofrecen recomendaciones sobre cómo los administradores de los estudios en el extranjero pueden proponer políticas igualitarias y abrirse camino en la compleja tarea de una revisión de políticas.

**Keywords:**

Equity, financial model, home school tuition, policy, study abroad

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**Introduction**

In recent decades an increasing number of private colleges and universities have shifted to charging students home school tuition for study abroad. Most institutions maintain that they have adopted home school tuition as their study abroad fee policy in order to provide more equitable access to study abroad. Under the policy, instead of waiving tuition for students who are off campus for a study abroad semester, they continue to collect tuition and then pay the study abroad programs on behalf of the students. They explain that the policy makes it possible for institutional aid to be applied to study abroad, which is more inclusive, since students who rely on institutional aid then have the means to finance a study abroad semester. When my institution, a private liberal arts college, began to question whether or not it might transition to a home school tuition policy, we sought information to ground our decision-making process and guide our efforts to enact a study abroad fee policy that is equitable, financially sustainable, and administratively manageable. This article presents the results of that investigation, which can be a resource for other study abroad administrators who are considering the home school tuition policy and/or seeking ways to enact equitable study abroad fee policies. A review of the literature centers the need for institutions to select fee policies that work for social justice and provide equitable access to the high impact practice of study abroad. The results of this enquiry suggest that each institution of higher education must engage in its own collaborative interdepartmental process to identify how an equitable policy can be accomplished in a financially sustainable and administratively manageable way.

## Overview

This article synthesizes scholarship and research from a variety of fields relevant to enacting a study abroad fee policy that is equitable, financially sustainable, and administratively manageable. In order to establish the context in which institutions must determine study abroad fee policies, the first section presents the history of inequity in American higher education and study abroad. Next, a narrative literature review examines the (a) research on equity for study abroad and (b) research and conversation around study abroad financial models and fee policies. Then, as policy review requires administrators to engage in advocacy and change management, the article shares key discussion from the literature on how to advocate for institutional change. Bringing together essential takeaways from the literature, the article concludes with a summary and recommendations and implications for the field.

## The History: A Story of Oppression and Inequity in Higher Education Policy

The topic of diversity, equity, and inclusion (DEI) dominates the field of American higher education today (Mintz, 2021). While many higher education professionals are aware of the conversation and its origins and importance, it is relevant to remember that the nation's first colleges and universities emerged out of a colonial society that overtly practiced multiple forms of oppression and discrimination, such as racism, sexism, classism, and ableism (Dolmage, 2017; Dorn, 2017; Wilder, 2013). Wilder (2013) has documented extensively how the wealth that established American higher education was generated by enslaving Africans and enslaving and stealing land from Native Americans. Consequently, higher education became a tool for society's dominant group, a way to perpetuate the ideals that ensured the continued wealth and power of White, middle- to upper-middle-class men. Slowly but surely, stakeholders within and outside of the academy advocated and fought to expand access to higher education and create inclusive learning environments. Most significantly, the Servicemen's Readjustment Act of 1944 (known as the G.I. bill) and the growth of community colleges tripled postsecondary enrollment in the mid-twentieth century; the Civil Rights Act of 1964 outlawed discrimination on the basis of race, religion, or national origin; and the Higher Education Act of 1965 with the Education Amendments of 1972 prohibited gender-based discrimination in education (Title IX) and provided government financial aid to low-income

students (Comp et al., 2010; Geiger, 2016). To provide just a couple examples of how U.S. postsecondary enrollment has changed, in 2017 Hispanic students represented 19% of enrollments (up from 4% in 1976), and Black students represented 14% of enrollments (up from 10% in 1976) (U.S. Department of Education, 2021).

While these data from the U.S. Department of Education seem promising (2021), the story is not one of pure progress or “linear uplift and improvement,” as critical race scholars point out (Dixson & Rousseau Anderson, 2018, p. 122). Many stakeholders in higher education continue to be marginalized by the systemic oppression that birthed the United States, its colleges and universities, and daunting disparities in access, power, and wealth (Dixson & Rousseau Anderson, 2018; Dolmage, 2017; Ferguson, 2012; Rooks, 2006). In regard to race, consider that in 2021 Nikole Hannah-Jones was denied tenure votes because the board of trustees at University of North Carolina at Chapel Hill was uncomfortable with her Pulitzer Prize-winning “1619 project” that highlights the role of past and present racism in America (Jaschik, 2021). In terms of class, college completion rates are strongly linked to socioeconomic status with students who are both low-income and first-generation having a 21% chance of completion versus students who are not low-income or first-generation having a 66% chance of completion (Pell Institute, 2021). In regard to gender, women continue to encounter discrimination and harassment when studying and working in STEM fields (Cheney & Shattuck, 2020). These points remind us that there is still much work to be done to ensure inclusion in higher education and that we must continually examine policies and practices for their equity and take action to advance social justice.

### The Problem of Underrepresentation in Study Abroad

The data on study abroad participation by U.S. students tell a hopeful yet concerning story, mirroring in many ways the story of inequity in higher education. In the beginning, participants in study abroad were predominantly “White, female, young, single, financially comfortable, and without disability,” and despite the diversification of the student population in U.S. higher education and a wide variety of new study abroad opportunities, this continues to be the case today (Comp et al., 2010, p. 115; Institute of International Education, 2020). A comparison of U.S. Department of Education postsecondary enrollment data from 2017 and Institute of International Education (IIE) study abroad data from academic year 2017/18 reveals that Black students represented 14% of

postsecondary enrollment in the U.S. but only 6.1% of study abroad students; Hispanic students represented 19% of postsecondary enrollment but only 10.6% of study abroad students; whereas White students represented 56% of postsecondary enrollment and 70% of study abroad students. In addition to disparity in participation by race, many other students continue to be underrepresented in study abroad, such as students with disabilities, first-generation students, rural students, low-income students, adult students, STEM majors, and (in an unexpected plot twist) men (Hoffa & DePaul, 2010; Kommers, 2020).

Why is study abroad important? Study abroad has been appropriately designated as a high impact practice by the Association of American Colleges and Universities (Kilgo et al., 2015; Stebleton et al., 2013). While some of the research has been inconclusive (Salisbury et al., 2013; Twombly et al., 2012), there is evidence that study abroad correlates with improved graduation rates (NAFSA, n.d.-a; Sutton & Rubin, 2004) and increased employability (Farrugia & Sanger, 2017; Norris & Gillespie, 2009), contributes to college student development (Barber et al., 2013), and that students develop cross-cultural adaptability and intercultural maturity even on short-term programs (Chieffo & Griffith, 2004; Mapp, 2012; Opengart, 2018). Furthermore, one study found that students who study abroad are more likely to attend graduate school (Kommers, 2020). While additional longitudinal research is needed, it is probable that study abroad correlates with expanded career opportunities and higher salaries later in life. Therefore, it is imperative that we address issues of systemic inequity in study abroad programming, otherwise a select group of students will continue to benefit disproportionately, which could exacerbate disparities in a society that already suffers from unequal distributions of power and wealth.

## **A Review of Research on Equity for Study Abroad**

Equity can be defined as providing differentiated support to ensure that all students have access to similar quality study abroad programs and learning outcomes (Diversity Abroad, 2019; Harrison & Price, 2017). For decades, scholars and administrators have worked to make study abroad more equitable and inclusive (Barclay Hamir & Gozik, 2018; Comp, 2007; Comp et al., 2010). Due to the significant underrepresentation of many student groups in study abroad, the field's two leading professional organizations, NAFSA: Association of International Educators (NAFSA) and The Forum on Education Abroad (The Forum), collect scholarship and offer resources on increasing participation of

students according to a long list of categories: race and ethnicity, age, academic discipline, disability, financial need, first-generation, gender identity and sexual orientation, homeschool institution type with a focus on community college, national origin, religion and veterans (NAFSA, n.d.-b; The Forum, n.d.). In addition, another increasingly influential membership organization called Diversity Abroad was founded in 2006 with a mission to “create equitable access to the benefits of global education” (Diversity Abroad, n.d.). Its 2019 *Global Equity & Inclusion Guidelines for Education Abroad* provides practitioners with direction for establishing policies and practices that promote increased participation and inclusive support for diverse students in study abroad and points to the importance of collecting data over time in order to track whether progress is made.

### Interest in Study Abroad

Research demonstrates that there is significant interest in study abroad and that underrepresented student groups have been found to be just as interested in study abroad as majority groups. Rust et al. (2007) analyzed a sample of 413 institutions and 276,449 students from the Cooperative Institutional Research Program (CIRP) Freshman Survey and found that 53.8% of freshman had some interest in study abroad and that intent was “relatively comparable along race/ethnicity status” (p. 11). Although some studies have found a STEM major as negatively affecting intent (Luo & Jamieson-Drake, 2015; Stroud, 2010), Rust et al. (2007) found that “freshmen planning to major in math, engineering, and the physical sciences were just as interested in studying abroad as those in the humanities and social sciences” (p. 11). Goldstein and Lopez (2021) discovered that, while Latino/a and first-generation students were less likely than White and continuing generation students “to be exposed to study abroad or to be able to envision themselves as participants,” Latino/a, first-generation, White, and continuing generation students all had similar intent, or desire, to study abroad (p. 12). Luo and Jamieson-Drake (2015) found that, although Asian-American and African American students were less likely to study abroad, students of color (with the exception of Asian-American students) were just as likely to expect to study abroad as White students. Wanger et al. (2012) found that “Native students agree with majority students that study abroad is beneficial and, like majority students, face barriers to participation that are often associated with finances” (p. 139). This research indicates that underrepresented students are interested in study abroad and that the

challenge is to sustain that interest and make study abroad more accessible to all students (Rust et al., 2007).

### Barriers to Participation in Study Abroad

A robust corpus of research identifies financial concerns/cost as the primary barrier to study abroad. It is mentioned as an issue for many different student groups, including students of color (Brux & Fry, 2010; Comp, 2007; Kasravi, 2009; Luo & Jamieson-Drake, 2015; Salisbury et al., 2011; Van Der Meid, 2003; Wanger, 2012), low-income and first-generation students (Norfles, 2007), men (Lucas, 2009), students with disabilities (Hameister et al., 1999), and students in general (Albers-Miller et al., 1999; Stroud, 2015; Vernon et al., 2017). While cost is a significant concern, it is not the only factor hindering participation in study abroad. Other barriers include concerns around academic planning (Brux & Fry, 2010; Hameister et al., 1999; Kasravi, 2009; Norfles, 2007; Stroud, 2015), family (obligations or lack of support) (Brux & Fry, 2010; Comp, 2007; Hameister et al., 1999; Norfles, 2007; Van der Meid, 2003; Wanger, 2012), and finding a program of interest (Brux & Fry, 2010; Comp, 2007; Hameister et al., 1999; Van der Meid, 2003). Students also voice concerns about cultural differences or discrimination (Brux & Fry, 2010; Comp, 2007, Hameister et al., 1999; Van der Meid, 2003) and safety (Brux & Fry, 2010), and report lack of information about study abroad as a barrier (Norfles, 2007; Wanger, 2012).

Multiple researchers have underscored the need for better communication and outreach to underrepresented student groups (Hipple et al., 2020; Norfles, 2007; Perkins, 2020; Wanger, 2012; Whatley & Stitch, 2021). Hipple et al. (2020) studied outreach to queer students and determined that while some outreach exists, it could be improved. Whatley and Stitch (2021) compared institutions to determine if their policies and practices influenced study abroad participation (as determined by a qualitative content analysis of their websites). They found that institutions with more outreach to underrepresented student groups and parents also had higher-than-predicted study abroad participation rates (p. 159).

Researchers for students with disabilities call attention to the need for flexible instruction, accommodations, and inclusive curriculum (Hameister et al., 1999; Masterson-Algar et al., 2020; Prohn et al., 2016). Researchers studying the experiences of historically underrepresented students during short-term group programs conclude that programs need to prioritize inclusive practices

and equip students with strategies for understanding social inequities in order to reduce the chance of marginalization while abroad (Chang, 2017; Johnstone et al., 2020). This recommendation is echoed by student development theorists Abes et al. (2019), who explain that the dissonance so often attributed with fostering growth during study abroad might be debilitating for minoritized students. Drawing on critical theory, they recommend a supportive curriculum that names social inequities, teaches students agency, and creates spaces for reflection and dialogue.

Lastly, some scholars have investigated the problem of underrepresentation using an anti-deficit approach. Kasravi (2009) reported that students of color “overcame the obstacles through information seeking, use of external messengers, personal determination, and internal drive” (p. iii). Perkins (2020) found that students of color used cultural and social capital to make their study abroad goals a reality and were motivated by the belief that study abroad would expand their cultural knowledge, skills, and network of friends and peers.

Clearly, there are many underlying and interrelated factors that impact equitable access to study abroad, but foundational to the conversation are students’ financial concerns. Quoted in *A Student Guide to Study Abroad* (Berdan et al., 2013), Buff, a student from Northern Oklahoma College shares: “Financial aid is the only reason I was able to study abroad. Without it, I wouldn’t have gone, period” (p. 92).

### Financial Aid for Study Abroad

In 1992, language was added to the Higher Education Act that made it possible for federal financial aid to be used for study abroad (Cressey & Stubbs, 2010). As long as study abroad students remain concurrently enrolled at their home school and receive academic credit from the home school for courses taken abroad, students can use federal grants and loans to pay for study abroad (Sagayaga & Zinori, 2021). Whether or not institutional aid can be used to pay for study abroad is up to the institution, and many colleges and universities have been reluctant to allow institutional aid to be spent off campus (Cressey & Stubbs, 2010, Lauman et al., 2006).

Research on how specific types of financial aid impact participation in study abroad is limited. The few studies that exist concur that various forms of grant aid can increase the likelihood of study abroad (Salisbury et al., 2011;



Whatley, 2017; Whatley & Clayton, 2020), with the exception that Salisbury et al. (2011) found that White students were less likely to want to study abroad if receiving a federal grant. In the only study focused solely on low-income students, Whatley and Clayton (2020) found that students were 50%-71% more likely to study abroad if they received need-based grant aid. In regard to loans, studies have found some variation around impact on participation. Whatley (2017) found loans negatively influenced the likelihood of study abroad when sampling students from a range of income backgrounds. Salisbury et al. (2011) found Hispanic students were less likely to study abroad when receiving a federal loan. However, Whatley and Clayton (2020) noticed that subsidized loans had a small positive relationship with participation for low-income students who did not receive need-based grant aid. In short, financial aid in the form of grants generally leads to increased participation in study abroad, whereas loan aid may or may not increase participation. It is also important to consider how different student groups react to the various forms of aid.

While there is no research that has focused specifically on the impact of institutional aid on study abroad participation, a study at a small private all-women's college offers some insight. The college, which provides institutional need-based grant aid for study abroad to all qualifying students, found that race and first-generation status did not play a significant role in the likelihood of study abroad for its students (faculty and parent encouragement were much more influential), and that family income had only a small effect on participation (Paus & Robinson, 2008). These findings suggest that institutional aid can increase participation for some underrepresented groups.

## **A Review of the Research on Study Abroad Financial Models**

To date, there has been hardly any research into study abroad financial models and whether one model might be more equitable and/or beneficial to institutions and students. The lack of research is perhaps due to the fact that study abroad financial models can be quite complex and vary considerably from institution to institution (Gunter, 2019; Poe, 2021; The Forum, 2017; Whalen, 2008). Identifying this gap in the literature, Gunter (2019) interviewed senior study abroad professionals from 12 different institutions on organizational and fiscal structures and concluded that "there is no one best answer when it comes to designing or redesigning the administrative and financial structures of study

abroad programs at an institution” (p. 101). Although formal studies are extremely limited and add little insight into the debate for private institutions (Nelson, 1995), ample conversation around the topic of financial models can be found in organizational reports, news media, non-research journal articles, and data made available from surveys of the field. Two interrelated factors emerge as most relevant to the conversation: (a) the way the study abroad office is funded, i.e., how it fits into the institutional budget structure, and (b) the policy by which students are charged for study abroad programs.

### Budget Structures: Decentralized, Centralized, or Hybrid

Study abroad office budget structures generally fall into one of three categories: decentralized, centralized, or hybrid (Brockington, 2002; Poe, 2021). In a decentralized structure, the study abroad office is self-supporting and generates its own revenue, which is accomplished through various means, but often includes charging per student study abroad fees (Brockington, 2002; Poe, 2021; Forum, 2017). This structure gives the office more autonomy and, therefore, allows the office to be nimbler as it tackles various challenges and initiatives. In a centralized structure, the office receives its funding from the institution’s general fund, which can offer stability as office finances are not susceptible to fluctuations in the number of students studying abroad (Brockington, 2002; Poe, 2021). This structure can encourage stronger institutional alignment around tasks and priorities, but it can also slow approval of funding for items such as new initiatives or staff hires and makes the office more dependent on the financial health of the institution (Brockington, 2002; Poe, 2021). In a hybrid structure, the study abroad office receives part of its funding from the institution, perhaps to cover staff salaries, and part of its funding through its own revenue streams.

In the 2017 *State of the Field* report by The Forum, private institutions reported the following: 86% received funding from the institution’s general fund; 40% received funding from per student study abroad fees, 35% received funding from restricted endowments, 29% received funding from cost-sharing from program provider(s), 28% received funding from surplus from the collection of home school tuition, and 27% received funding from student fees paid by every student at the institution. While not explicitly stated, it is assumed that many institutions draw on some combination of these funding sources. Notably, when asked in the same survey about effective strategies for increasing study abroad

participation, some institutions pointed to financial changes such as “home school billing model” or “change in funding model” (The Forum, 2017, p. 10).

### Study Abroad Fee Policies: Home School Tuition or Pay Program Cost

The practice of collecting home school tuition for study abroad has been around since the beginning of study abroad, as most early programs were faculty led and tuition was reasonable relative to today’s standards (Cressey & Stubbs, 2010). For example, in 1925/26 Smith College launched its Smith Junior Year in France program for which it charged home school tuition (Contreras, 2015). Over the years, demands for additional program elements and services led to increased costs and, eventually, the cost of a study abroad program could exceed the home school tuition. By the 1960s two study abroad fee policies had emerged. An institution would either ask students to pay home school tuition or waive home school tuition and ask students to pay the program cost (and pay the home institution a small study abroad fee). The latter became more common, particularly at public institutions that could not subsidize program costs that exceeded tuition (Cressey & Stubbs, 2010), and today the pay program cost policy is still more popular. The Forum reports that 35% of institutions ask students to pay the program provider or host institution directly; 31% charge the program cost but bill the students and pay the provider on their behalf; 29% charge home school tuition but ask students to pay for their own room and board; and 18% charge home school tuition that includes room and board (Whalen, 2008). However, these data include both private and public institutions and the home school tuition policy is more common at private institutions that charge a higher tuition that can cover the cost of an average study abroad program. While working on this article, I conducted a rapid review of study abroad fee policies as published online by 32 private colleges and universities in the northeast of the US. This showed me that 21 (66%) of these institutions charge home school tuition for study abroad.

### The Pros and Cons of Home School Tuition

There are advantages and disadvantages of different methods of charging students for study abroad. There is some discussion that charging home school tuition generates a surplus for colleges and universities (Williamson, 2010), but in reality, either model has the “potential to be an economic cost or benefit to the home institution” (Cressey & Stubbs, 2010, p. 270).

To explore this concept further, I focus on the factors that impact the home school tuition policy.

It is possible that home school tuition may save institutions from lost tuition revenue and create a surplus that can be used to support the institution in general and/or its study abroad program (Cressey & Stubbs, 2010). For example, the Director of Study Abroad at a private university reported that the university adopted home school tuition due to the fact that approximately 43% of any graduating class studies abroad, which had been causing a substantial revenue loss for the university (anonymous, personal communication, June 18, 2021). During our conversation, the Director pointed to a significant advantage of the policy, namely that it enables their university to allow its institutional aid to be used for off-campus study abroad, which creates more equitable access to study abroad. This benefit is cited by other professionals in the field as a primary reason for why their institutions maintain the policy (Anzilotti, 2011; Fischer, 2008). Statements about how home school tuition is more financially equitable can be found on various institutions' websites (Boston College, 2021; Brandeis University, n.d.; Providence College, 2018; Trinity College, 2018).

While allowing institutional aid to cover study abroad costs under the home school tuition policy seems quite favorable, there is at least one catch to consider. Institutional aid comes in many forms, sometimes in the form of tuition discounts, in which case allowing institutional aid to travel can result in a financial deficit for an institution if study abroad costs are not incorporated into the budget calculations that determine the discounts (Brockington, 2002; Cressey & Stubbs, 2010; Fischer, 2009; Gunter, 2019). Brockington (2002) explains the potential scenario well:

For U.S. liberal arts colleges, the funding problem is further exacerbated by the discrepancy between the published tuition price and the actual tuition amount collected. Because tuition discounts are typically awarded to individual students in the form of institutional merit scholarships or grants, these tuition discounts are especially problematic in the area of education abroad. Although the on-campus institutional budget is constructed on the basis of discounted revenue dollars, the programs overseas have to be paid for with full dollars. This can lead to a revenue-expense gap of thousands of dollars for each participant and mean financial shortfalls in the institution's overall budget. (p. 286)

This passage illustrates how study abroad administrators must carefully evaluate their institutions' financial policies and budgets in order to determine if and how to implement a home school tuition policy. To this point, one study abroad professional interviewed by Gunter (2019) shared that study abroad offices are expected to work with the philosophy of the budget office and within the "established framework" of their institution when determining whether or not home school tuition will work (p. 85).

There are additional factors to consider when deciding a study abroad fee policy. On one hand, the literature advises institutions to consider the indirect costs of students studying away from campus, such as loss of revenues from room and board or less student spending at campus venues (Cressey & Stubbs, 2010). On the other hand, it is noted that when students are away from campus it can save institutions money by reducing demands on faculty, class size, student services, and residence halls (Heitmann, 2008). These factors apply regardless of the institutional policy for charging students to participate in study abroad.

### The Student (and Parent) Perspective

There is much for practitioners to consider when deciding how to charge for study abroad, including the perspective of students and parents. It is acknowledged in the field that, due to the wide variety of institutional policies, two students at a study abroad program may be paying very different prices for the same experience (Cressey & Stubbs, 2010). Due to the fact that program provider and host institution prices are readily available to the public, students can easily compare program prices versus their home school tuition. Student frustration with the home school tuition policy has appeared in the media with students claiming it is unfair to charge home school tuition for a program that costs much less (Anzilotti, 2011; Levy, 2019). In 2008, a parent filed a lawsuit against Wheaton College in Massachusetts, noting that the college tuition cost approximately \$21,440, while their child's study abroad program cost approximately \$17,000 (Fischer, 2008). Wheaton defended its policy and over a decade later continues to charge home school tuition for study abroad. Levy (2019), a student at Georgetown University, writes that "Allowing students to pay the tuition of the school at which they study would decrease the financial burden and incentivize more students to take advantage of opportunities outside the country." Indeed, this potential advantage of a policy that asks students to pay the program cost might appeal to some students, in particular

full-fee students who hope to save money during study abroad. However, other students may prefer a home school tuition policy that allows institutional aid to be used for study abroad.

## **Resources for Advocating for Institutional Change**

Administrators advocating for equitable study abroad fee policies will need to work within their institutions to design and implement changes in policy and procedures. They will want to (a) consider the institution's mission, structure, and culture, and (b) collaborate for change.

### **Mission, Structure, and Culture**

There is ample literature that speaks to the importance of connecting departmental proposals or change initiatives with the vision, mission, and strategic plan of the institution. This prevailing theme appears in resources for higher education professionals in general (Kezar & Lester, 2009, 2011; McNair et al., 2016) and in resources for study abroad professionals (Bender & Jones, 2015; Heisel & Kissler, 2010; Sagayaga & Zinori, 2021; West, 2021; Wilson-Oyelaran, 2007). When advocating for resources or change in study abroad policy, it is recommended that messaging to stakeholders explicitly connect the proposal to the institutional mission and provide data that are meaningful for the audience and that allow decision-makers to see the need for change (Blanchard, 2018; Comp, 2018; Kezar & Lester, 2011). As "accrediting agencies tend to look at how well an institution is achieving its particular mission" (Sagayaga & Zinori, 2021, p. 25), and many institutions face financial challenges, leadership is likely to prioritize initiatives that most effectively support the mission (West, 2021).

In addition, the structure and the culture of the institution must be considered. It is imperative to know the governing structures that can promote or prevent a change in policy (Kezar & Lester, 2009; Sagayaga & Zinori, 2021). Advocates for equity in study abroad programming must determine "which committees or individuals make decisions about relevant policies, and under what structures or regulations ... they operate" (Sagayaga & Zinori, 2021, p. 25). In addition to consulting official rules and regulations, there are numerous organizational theories that can help higher education professionals understand the structure of their institution and identify its strengths and

weaknesses (Manning, 2013). For example, if the institution exhibits a more feminist, connective web-like structure, it might benefit from an open structure with increased participation and flexibility, but struggle if lacking the presence of a strong leader (Manning, 2013).

Furthermore, institutional culture can have a profound effect on how work is conducted and decisions are made (Bender & Jones, 2015; Tierney, 1988). Culture can be defined as the values, assumptions, history, and traditions that guide behavior, and “any college or university has effective and ineffective features crafted into its unique institutional culture” (Manning, 2013, p. 71). An analysis of the institutional culture can illuminate dynamics around power and influence and empower professionals with information (Di Maria, 2018; Tierney, 1988). Therefore, it is recommended to begin any initiative with an assessment of the institutional culture, keeping in mind that multiple subcultures may exist within one institution (Kezar & Lester, 2009; Manning, 2013).

### Collaboration and Change Management

Collaboration among higher education stakeholders produces better outcomes than older, hierarchical and authoritative approaches (Harrison & Price, 2017; Kezar & Lester, 2009; McNair et al., 2016). Kezar and Lester (2009) share how the “natural synergies” of collaboration can lead to innovation and learning, cognitive complexity (the idea that multiple perspectives enhance solutions to problems), better service, and improved employee motivation. Indeed, when asked how international education leaders can navigate campus finances, a university vice president for finance and administration advised:

Make sure that you have good relationships with the bursar’s office, with financial aid, with the admissions office—undergrad and grad admissions—with the provost’s office, with the CFO. ... I believe that relationships make the world go round. Having a good solid network of people you trust and who trust you will help immensely moving forward. (West, 2021)

The literature on change management supports this position by asserting that change is best accomplished through collaboration that builds trust in the persons leading the change (Bess & Dee, 2008; Blanchard, 2018). Change efforts fail for many reasons, but two key reasons are when “people’s concerns with change are not surfaced or addressed” and “those being asked to change are not involved in planning the change” (Blanchard, 2018). Therefore, it is important

to involve as many stakeholders as possible when planning changes in study abroad policy in order to allow concerns to surface and establish trust.

While collaboration can be quite beneficial, even necessary, there is acknowledgement that it is also difficult and that it “embodies a paradox” (Kezar & Lester, 2009, p. ix). Collaboration requires and thrives on group goals and norms, but “typically, individuals are rewarded, individuals are held accountable, individuals hold a spot within institutional hierarchies, and the like” (Kezar & Lester, 2009, p. x). Academic capitalism, which encourages market-like behavior towards resources and prestige, can intensify competition and tensions (Harrison & Price, 2017; McNair et al., 2016). Furthermore, during periods of change (and most notably retrenchment) stakeholders can revert to competition and conflict when collaboration is most needed (Cameron & Whetten, 1983). How might higher educational professionals who want to advocate for equitable study abroad fee policies navigate this paradox? They can provide “social and emotional support” to the community by providing a “strong and resonant vision” for the collaboration, a vision that is motivating and inspires colleagues to care and support equitable study abroad policies (McNair et al., 2016, p. 69). In addition, they can draw on the following counsel offered by Fisher-Yoshida and Geller (2009): “While dilemmas create tension, if we honor them for the gifts of new perspectives, then creative energy is freed as we learn to pay attention to the individual and group needs at the same time” (p. 141).

## Summary and Recommendations

### Enact An Equitable Policy

Working for diversity, equity, and inclusion is some of the most important work in higher education today and, therefore, *equitable access to the high impact practice of study abroad should be the principal goal of any study abroad fee policy review*. It is a salient fact that American higher education historically excluded students from nondominant groups, a practice that has perpetuated unequal distributions of wealth, power, and access in our society, and that these disparities continue to manifest in higher education and must be corrected (Dolmage, 2017; Dorn, 2017; Ferguson, 2012; Rooks, 2006; Wilder, 2013). In addition, it is important to recognize that historical systems of oppression are extremely difficult to undo and that without constant attention



students from nondominant groups will continue to experience marginalization (Dixson & Rousseau Anderson, 2018).

In regard to access to study abroad, the research shows that a primary barrier for students from historically underrepresented and underserved groups is cost (e.g., Comp, 2007; Hameister et al., 1999; Wanger, 2012). It also shows that providing need-based grant aid increases participation, in particular for low-income students (Salisbury et al., 2011; Whatley & Clayton, 2020). *Therefore, it is imperative that institutions find a way to provide all eligible students need-based aid for study abroad. The aid should cover the full difference between the student's resources and the total cost of the study abroad program.* In addition, institutions must provide study abroad programming that produces similar learning outcomes for students of all identities. Not only should all students be able to access the same programs, but if there are costs associated with implementing new curricula or support services in order to achieve similar learning outcomes, those costs must be included in budget calculations. In order to better track their future work and progress in regard to equity and inclusion, it is also imperative that institutions assess and improve their data collection efforts (Diversity Abroad, 2019). Institutions should monitor study abroad participation according to a wide diversity of student groups. Lastly, drawing on the research that underscores the importance of outreach to students who are underrepresented in study abroad (Hipple et al., 2020; Norfles, 2007; Perkins, 2020; Wanger, 2012; Whatley & Stitch, 2021), institutions should ensure that the following message is widely shared and clear: study abroad is financially obtainable for all students.

### Enact A Financially Sustainable Policy

The literature makes it abundantly clear that the variables that impact study abroad financial models are numerous and differ significantly among institutions (Brockington, 2002; Cressey & Stubbs, 2010; Gunter, 2019; Poe, 2021; The Forum, 2017; Whalen, 2008). Subsequently, a policy that serves one institution may not serve another institution, and decision-makers can draw only limited guidance from studies. Each institution must engage in an internal investigation to seek its own answers as to which financial model will be the most financially sustainable. Of course, the budget structure and study abroad fee policy must be considered together to determine the full financial model. Is the budget structure flexible, or is it unlikely to change? Such parameters should be determined at the outset of the investigation (Gunter, 2019). The need for this

internal analysis presents a valuable opportunity for study abroad administrators and their institutions because it requires collaboration between departments at an early stage in the review. Should a policy change arise, such collaboration will result in more effective change management, as relevant stakeholders will have had the chance to air their concerns and questions and contribute their valuable perspectives prior to the implementation of the new policy (Bess & Dee, 2008; Blanchard, 2018).

For institutions that uphold study abroad as an established part of their mission and culture, *I believe that the home school tuition policy should be strongly considered.* Drawing on data from previous years of study abroad participation and study abroad program costs, an institution should be able to create reasonable projections as to the financial implications for the institution and fold study abroad into the process by which it sets tuition and awards institutional aid, including tuition discounts. This approach may create a more sustainable method by which to provide need-based institutional aid for study abroad. See Appendix for a list of questions to consider under a home school tuition policy.

### Enact An Administratively Manageable Policy

Echoing the findings and analysis in the previous section, I note that the variables that impact study abroad administration are numerous and differ significantly between institutions (Gunter, 2019; The Forum, 2017; Whalen, 2008). Basic parameters such as staffing levels at relevant offices can vary widely from institution to institution. These factors indicate once again that each institution must seek its own answers as to which policy will be the most administratively manageable. In conjunction with the collaborative financial analysis, *I recommend that institutions complete a side-by-side analysis of the administrative tasks associated with the current policy and potential new policy.* Most likely, institutions will want to consider (a) process/tasks under a pay program cost policy, and (b) process/tasks under a home school tuition policy. As the myriad administrative tasks associated with either policy can be quite overwhelming, I suggest focusing on the big picture and only the tasks critical to determining the preferred financial model. Necessarily, some of the details will need to be worked out at a later stage. I recommend that the analysis prioritize the student perspective and processes over internal departmental processes.

## Create the Vision and Project Plan

Understandably, the task of identifying a study abroad fee policy that is simultaneously equitable, financially sustainable, and administratively manageable may seem daunting. It is equal parts exciting and daunting. How might study abroad administrators help their institutions tackle such an important and complex project? First, study abroad practitioners can call on the aforementioned history and research to create the foundation, vision, and emotional support necessary to guide their institutions to and through the policy review (McNair et al., 2016). They can inspire key stakeholders to recognize the need for change in order to achieve equity and embrace collaboration around potential changes to financial and administrative policies and processes. *Practitioners should make direct connections between the policy review and the mission and strategic priorities of the institution and present meaningful data that allow leadership and other stakeholders to realize the need for change.* If an institution's strategic plan does not set goals for diversity, equity, and inclusion, a practitioner will likely have to start with advocating for such goals. Lastly, I suggest that practitioners can make the project more manageable by organizing it into four distinct phases: prepare, collaborate, enact, and sustain.

In the prepare phase, establish a small committee with members from the study abroad office and institutional research in order to collect preliminary data, complete an initial financial and administrative analysis, identify the governing structure, institutional culture, and organizational strengths and weaknesses, draft a project management plan, and propose the review to leadership. Next, in the collaborate phase, establish with the support of leadership an interdepartmental project committee representing key offices and stakeholders such as study abroad, academic affairs, student affairs, advancement, DEI, treasurer, registrar, bursar, financial aid, admissions, faculty, and students. If student representation on the committee is not feasible, then include the student voice in alternate ways, perhaps by conducting a focus group or interviewing students who have returned from study abroad. Lead the committee through a transparent and time-delineated project management plan to collect and analyze additional financial and administrative task data and present a final recommendation to leadership. If a policy change is recommended and approved, move through the enact phase, which includes creating and implementing a communication and change management plan. It will be necessary to document, communicate, and train on the new policy,

workflow, and task ownership. Institutions may wish to use a tool such as the RACI model that helps document per task who is Responsible, Accountable, Consulted, and Informed. Lastly, to sustain the work, share reports of success and implement strategies for ongoing data collection, evaluation, and improvement of the study abroad fee policy.

## Implications for the Field

The complexity and variability of study abroad financial models makes it difficult to translate a policy from one institution to another, yet study abroad professionals are eager for more information and guidance on financial models and the home school tuition policy. While I conclude that institutions must look to their individual missions and structures for ultimate direction, I see an opportunity for professionals in the field to better support each other.

First, I encourage institutions to collect ample data and track the outcome of any changes in policy and share their findings with the field. Next, study abroad professionals need to connect to each other to gather guidance and perspectives on the myriad decisions related to financial policies. I believe the field would benefit from a central resource, made available either through NAFSA or The Forum, by which study abroad professionals could identify colleagues whom they could contact and ask particular questions. Participating institutions could be surveyed on core questions relating to budget structures and fee policies in order to create a searchable database and platform for connecting colleagues to each other. In addition, as the field engages in future research, it must focus on how study abroad financial models and fee policies impact DEI efforts, in particular on how institutional aid impacts study abroad participation according to different student groups. I also echo previous calls to the field to collect better disaggregated data on study abroad participation both at the institutional and national level. The Open Doors survey could begin to track participation by additional student categories such as low-income, first-generation, age, and veteran status. Also, Open Doors could collect more nuanced data in regard to how institutions provide financial support for study abroad. For example, if institutions award institutional aid, does it cover the full difference between a student's resources and the cost of the study abroad program? Is the aid available for semester, year, short-term, or virtual study abroad (which may emerge as a lasting outcome of the pandemic)? Lastly, in reviewing the field's *Standards of Good Practice for Education Abroad* (The

Forum, 2020), I noted that only two of the seven subclauses of the “Equity, Diversity, and Inclusion” clause are required (versus recommended), in contrast to other clauses that have a higher percentage of required subclauses. I call on the field to adjust its standards of good practice to strengthen the DEI clause and require that institutions *shall* ensure equitable access to education abroad.

## Conclusion

The roots of American higher education continue to foster inequities in the college experience, including study abroad. An examination of the history and research reveals the need for study abroad practitioners and their institutions to implement fee policies that center social justice and achieve equitable access to the high impact practice of study abroad. Colleges and universities can make significant steps in the right direction by providing need-based institutional grant aid for study abroad and funding changes to program curricula to achieve similar study abroad learning outcomes for students of all identities. Are these goals best accomplished by charging home school tuition for study abroad or asking students to pay the program cost? Since the variables that impact study abroad financial and administrative models are numerous and differ significantly among institutions, this question must be determined by each individual institution. I recommend a collaborative interdepartmental investigation to design and implement a policy that will serve all students and contribute to the ongoing effort to make equitable study abroad fee policies standard practice for the field of education abroad.

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## Author Biography

**Adelia Pope** has over 20 years of experience in international education. Currently, she serves as Study Abroad Coordinator for the McCulloch Center for Global Initiatives at Mount Holyoke College. Adelia holds a Master's of Education in Higher Education from the University of Massachusetts Amherst and her studies focus on equitable policy and practice within study abroad. She studied abroad for a year in Vienna, Austria.

## Appendix

### Questions to Consider for a Home School Tuition Policy

- 1) Will we charge tuition only or tuition and room and board?
- 2) What will home school tuition cover (in addition to the study abroad program tuition)? Consider:
  - a. Non-refundable program deposit (If yes, will we require paperwork from students? Will we pay directly or reimburse students?)
  - b. Academic fees
  - c. Additional fee for required orientation (rarely not in program tuition)
  - d. Printed and electronic course materials
  - e. School of record fees
  - f. Transcripts
- 3) What will home school tuition NOT cover? Consider:
  - a. Program application fees
  - b. Passport, visa, immunization fees
  - c. International travel
  - d. Security deposit
  - e. Personal expenses
  - f. Textbooks
  - g. Tangible course supplies such as lab coats or musical instruments
  - h. Optional program excursions
  - i. Independent travel
  - j. Health insurance
- 4) If charging room and board, what will it cover or not cover? Consider:
  - a. Stipend for cost of food, housing and transportation if not provided by study abroad program
  - b. Accommodation upgrades
- 5) Where will the study abroad program tuition bill be sent? Where will the room and board bill be sent?
- 6) How will we handle housing deposits?

- 7) How will we handle bills for non-tuition expenses such as additional excursions?
- 8) Will we cover study abroad programs that cost more than home school tuition?
- 9) Will we offer study abroad programs that cost more than net tuition revenue?
- 10) Will we need to restrict study abroad programs or reevaluate our approved program list?
- 11) Will there be any exceptions to the home school tuition policy?
- 12) What will be the cancellation and tuition refund policy?
- 13) How will a student's financial aid package be reviewed and adjusted for the semester or year that the student will be abroad?
- 14) Who will create the study abroad program budget that will be used to determine a student's financial aid, and will the budget include non-billed expenses (e.g., airfare, local transportation, and other costs determined by program)?
- 15) How will outside scholarships affect a student's financial aid package?
- 16) How will we compensate for the loss of work study financial aid during study abroad?
- 17) What services will students retain while abroad (e.g., IT support, counseling, advising, online library, research services)?
- 18) Will academic credits and grades be treated as regular credits and grades or transfer credit?